4.5 HISTORICAL DATA

Introduction

The Historical Data screen allows you to:

➤ View historical item data for an ID for up to 14 statistical periods

➤ Specify select items to display

➤ View different versions of the item data: reported, edited, adjusted, weighted-adjusted

➤ View current-to-prior period ratios for the items specified

➤ Edit item data

➤ Access the Notes screen for an ID

Accessing the Screen

! Click on the REVIEW AND CORRECTION button from the StEPS Main Menu.
! From the Review and Correction Main Menu, choose a selection set to process. (See Chapter 4.1 for more information on accessing and creating selection sets.)
! Select the GOTO pmenu option.
! Select "Item Data".
! Select "Historical Data".

NOTE: YOU MAY ALSO ACCESS THE HISTORICAL DATA SCREEN FROM ANY OF THE OTHER REVIEW AND CORRECTIONS SCREENS BY USING THE GOTO PMENU OPTION.
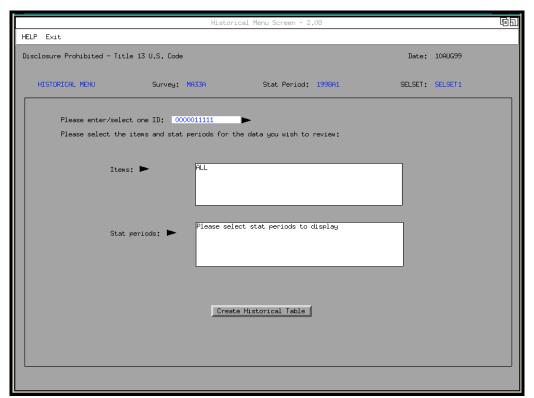
```
┌─────────────────────────────────────────────────────────────────────┐
│                    Historical Menu Screen - 2.08                  回团 │
│ HELP  Exit                                                            │
│                                                                       │
│ Disclosure Prohibited - Title 13 U.S. Code              Date:  10AUG99│
│                                                                       │
│   HISTORICAL MENU          Survey: MA33A       Stat Period: 1998A1    │
│                                                        SELSET: SELSET1│
│   ┌─────────────────────────────────────────────────────────────┐    │
│   │                                                               │    │
│   │   Please enter/select one ID:   0000011111      ▶            │    │
│   │   Please select the items and stat periods for the data you wish to review: │
│   │                                                               │    │
│   │                              ┌──────────────────────────────┐ │    │
│   │         Items:  ▶            │ALL                           │ │    │
│   │                              │                              │ │    │
│   │                              └──────────────────────────────┘ │    │
│   │                                                               │    │
│   │                              ┌──────────────────────────────┐ │    │
│   │         Stat periods:  ▶     │Please select stat periods to display│ │
│   │                              │                              │ │    │
│   │                              └──────────────────────────────┘ │    │
│   │                                                               │    │
│   │                                                               │    │
│   │                       ┌──────────────────────┐                │    │
│   │                       │ Create Historical Table│               │    │
│   │                       └──────────────────────┘                │    │
│   │                                                               │    │
│   │                                                               │    │
│   └─────────────────────────────────────────────────────────────┘    │
│                                                                       │
└─────────────────────────────────────────────────────────────────────┘
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Figure 4.5   Historical Data Screen Menu

Screen Features

There are 2 screens associated with the Historical Data Review in StEPS. The 1st screen displays the survey, stat period, selection set, and ID currently being processed. It prompts you to choose the items and stat periods for the data you want to review. The 2nd screen contains a table which displays the item data values for the items and stat periods specified in the 1st screen. From this screen, you can view different versions of the data (reported, edited, adjusted, weighted-adjusted), view current-to-prior period ratios, and make corrections to edited data.

The 1st screen (displayed above) provides a header which contains the following information:

SURVEY

!   Displays default survey currently being processed.
!   Field not correctable.
!   To change the survey, you must access the Survey Selection screen from USER SETUP (See

Chapter 1.1).
! Click on the survey field to display the survey name.

STAT PERIOD

! Displays default stat period currently being processed.
! Field not correctable.
! To change the stat period, you must access the Survey Selection screen from USER SETUP (See Chapter 1.1).

SELSET

! Displays the filename of the selection set currently being processed. (See Chapter 4.1 for more information regarding selection sets.)
! Click on the SELSET field to display a description of the selection set.
! Field not correctable.
! To access a different selection set or create a new one, return to the Review and Correction Main Menu.

ID

Select an ID to review by:

1. Keying an ID in the ID field and pressing <ENTER>.
2. Clicking on the arrow in the ID field to bring up an ID pick list of all IDs in the selection set.

   ! ID and NAME1 will be displayed in the pick list in ascending ID order.

   ! The vertical scroll bar on the right side of the pick list will allow you to scroll through IDs in the selection set.

   ! Choose an ID by clicking on it with the mouse.

   ! Perform searches to find a particular ID by clicking on the FIND button. You will be prompted to enter a string (partial ID). Click on "OK". The ID pick list will display, beginning with the 1st occurrence of the ID matching the string entered.

4.5.1   CHOOSE ITEMS AND STAT PERIODS TO REVIEW

After entering an ID, you must specify the items and stat periods of data you wish to review:

CHOOSE ITEMS:

! Click on the arrow in the Item field to display a pick list of valid items for the survey.
! Click on the items you want to include in your review. The items chosen will be marked with an asterisk '*'. Deselect an item by clicking on it again.
! When you have finished selecting your items, click on the "OK" button.
! The items chosen will be displayed in the box to the right of the Item field.
! To choose "ALL" items, click on the arrow in the Item field. When the Item pick list displays, do not mark any items. Simply click on "OK".
! The items chosen will become the default for the historical data review until you change them.

CHOOSE STAT PERIODS:

! Click on the arrow in the Stat Period field to display a pick list of valid stat periods for the survey.
! Click on the stat periods you want to include in your review. You may choose up to 14 stat periods.
! You must select at least one stat period.
! The stat periods chosen will be marked with an asterisk '*'. Deselect a stat period by clicking on it again.
! When you have finished selecting your stat periods, click on the "OK" button.
! The stat periods chosen will be displayed in the box to the right of the Stat Period field.
! The stat periods chosen will become the default for the historical data review until you change them.

After you have chosen the items and stat periods to include in your review, click on the 'Create Historical Table' button.

4.5.2   HISTORICAL DATA DISPLAY

When you click on the 'Create Historical Data Table' button from the Historical Data Menu screen, the following will display:
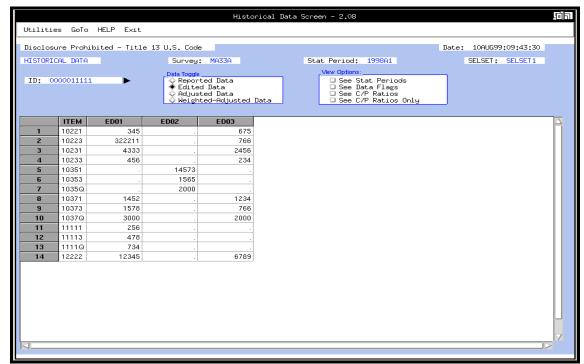


```
                              Historical Data Screen - 2.08                              
 Utilities  GoTo  HELP  Exit

 Disclosure Prohibited - Title 13 U.S. Code                    Date:  10AUG99;09:43:30
 HISTORICAL DATA              Survey:  MA33A          Stat Period:  1998A1       SELSET:  SELSET1

   ID:  0000011111      ►      Data Toggle                  View Options:
                               ◇ Reported Data              ☐ See Stat Periods
                               ◈ Edited Data                ☐ See Data Flags
                               ◇ Adjusted Data              ☐ See C/P Ratios
                               ◇ Weighted-Adjusted Data     ☐ See C/P Ratios Only

          ITEM    ED01      ED02      ED03
     1    10221      345        .       675
     2    10223   322211        .       766
     3    10231     4333        .      2456
     4    10233      456        .       234
     5    10351        .     14573        .
     6    10353        .      1565        .
     7    1035Q        .      2000        .
     8    10371     1452        .      1234
     9    10373     1578        .       766
    10    1037Q     3000        .      2000
    11    11111      256        .         .
    12    11113      478        .         .
    13    1111Q      734        .         .
    14    12222    12345        .      6789
```

Figure 4.5.2   Historical Data Screen

The Header for this screen displays the survey, stat period, and selection set currently being processed. The ID specified in the Historical Data Menu screen will appear in the ID field. The item data for the items and stat periods specified in the Historical Data Menu screen will be displayed in the data table.

You may change the ID at any time to display the historical data for a different case for the same items and stat periods specified in the previous menu screen.

SPECIFY DATA VERSION TO DISPLAY

Specify the version (reported, edited, adjusted, weighted-adjusted) of the data you want displayed in the data table by selecting a data version from the "Data Toggle" box. The version you select will become the default.

Reported Data	Item data reported by the respondent; received through batch update.
Edited Data	Item data that has not been 'weighted' or 'adjusted'. Edited data can be identical to the 'reported' data of the respondent, or it may reflect changes to the reported data as a result of imputation or analyst correction.
Adjusted Data	For a reporting unit for a specified statistical period, data that incorporates an adjustment factor to compensate for differences between the time periods of the reporting unit and the survey; typically used for monthly surveys to adjust reports which reflect 4- and 5-week time periods. The adjustment flag (ADJFLG) in the Item Data Dictionary must equal 'Y' in order for data to be adjusted. This field is computed as EDDATA * reporting adjustment factor. For those items that are not adjusted, this field will be identical to the edited data (ED) field. Changing an edited data value will not update the adjusted value. The AD field will only contain <u>current</u> adjusted data if the adjustment module is run.
Weighted-adjusted Data	For weighted items indicated by WGTFLG = 'Y' in the Item Data Dictionary, weighted data is computed as ADDATA * WGT (from stat period control file) or ADDATA * WGT * GWWGT# (where # = 1,2, or 3 as specified in the corresponding Item Data Dictionary entry for gweight indicator GWTNUM). For those items that are not weighted, this field will be identical to the adjusted data (AD) field. Changing an edited data value will not update the weighted value. The WD field will only contain <u>current</u> weighted-adjusted data if the weighting module is run.

NOTE: Only the EDITED version of the data is correctable. ('REPORTED' data is generated from batch update; 'ADJUSTED' and 'WEIGHTED' data are calculated from EDITED data using other programs.)

VIEW OPTIONS

In addition to choosing which version (edited, reported, adjusted, weighted-adjusted) of the data to display, you are also provided with several other display options:

OPTION	FUNCTION
See Stat Periods	Display stat periods in item data table.
See Data Flags	Display data flag associated with each item value in data table.
See C/P Ratios	Display current-to-prior period ratio for item values in data table.
See C/P Ratios only	Display ONLY the current-to-prior period ratios for item values in data table. (Item codes, item values, data flag, and stat periods will NOT be displayed.)

Whichever 'View options' are chosen will become the default for this screen, preventing you from having to select the same options each time you view historical data for an ID.

DATA TABLE

The fields displayed in the historical data table are dependent on the view options and data versions selected. Column headings will, therefore, vary and may include ITEM, FLG(*xx*), STP(*xx*), RP(*xx*), ED(*xx*), AD(*xx*), WD(*xx*), ER(*xx*), where '*xx*' represents the stat period (01-14) specified in the Historical Menu screen.

Example: Stat periods selected: 1998A1, 1997A1, 1993A1

> 1998A1   column heading suffix - 01
> 1997A1   column heading suffix - 02
> 1993A1   column heading suffix - 03

Stat period data will be listed in chronological order regardless of the order in which the stat periods were chosen.

Listed below are descriptions of each field which may be displayed in the historical data table.

ITEM (ITM)

! The 5-character item code or mnemonic (defined in the Item Data Dictionary) will be displayed, unless you have chosen the "See C/P Ratios only" view option.

! Click on the item code to access a complete description of the item.

DATA FLAGS (FLG*xx*)

! Associated with each item value is a data flag. Data flags are used to identify the source of the edited data item value. (See Section 4.2.2 for a complete list of data flags and corresponding definitions.) Data flags will only be displayed if you choose the "See Data Flags" view option.

! If you edit data for an item, the Data Flag screen will automatically display. Press <ENTER> to select the default flag of 'A' for 'analyst correction'.

! If you do not want to use the default data flag, select another using the mouse. Some data flags are set by various programs within StEPS. You may only change data flags that are correctable by 'analysts' (See the "Set by" column in the Data Flag table in Section 4.2.2)

! You cannot change a data flag unless you have edited the item data.

ITEM DATA VALUES (RP*xx*, ED*xx*, AD*xx*, WD*xx*)

The data version selected, using the "Data toggle" option, will determine whether the reported, edited, adjusted, or weighted-adjusted version of the data is displayed. You can only view one version of the data at a time. Column headings will correspond to the data version chosen. For a complete definition of each data version, see "Specify data version to display" on page 4-5-5.

RP(*xx*)	Reported data, where *xx* = stat period
ED(*xx*)	Edited data, where *xx* = stat period
AD(*xx*)	Adjusted data, where *xx* = stat period
WD(*xx*)	Weighted-adjusted data, where *xx* = stat period

NOTE: Only the EDITED version of the data is correctable. ('REPORTED' data is generated from batch update; 'ADJUSTED' and 'WEIGHTED' data are caluclated from

EDITED data using other programs.)

CURRENT-TO-PRIOR RATIO (RR*xx*, ER*xx*, AR*xx*, WR*xx*)

! Displays the current-to-prior period ratios for the items displayed in the historical data table.
! Current-to-prior period ratios will only be displayed if the "See C/P Ratios" or "See C/P Ratios only" view options are selected.
! The current-to-prior period ratio is the current stat period item value divided by the prior stat period item value.
! Column headings indicate the following:

    RR(*xx*)   Current-to-prior ratio for <u>reported</u> data, where *xx* = stat period
    ER(*xx*)   Current-to-prior ratio for <u>edited, unadjusted</u> data, where *xx* = stat period
    AR(*xx*)   Current-to-prior ratio for <u>adjusted</u> data, where *xx* = stat period
    WR(*xx*)   Current-to-prior ratio for <u>weighted-adjusted</u> data, where *xx* = stat period

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STAT PERIOD (STP*xx*)

! Displays the actual stat period (i.e., 1998A1) for the data, as specified in the Historical Menu screen and represented by the '*xx*' suffix in the column headings.

4.5.3   MAKING CORRECTIONS

! Corrections can only be made to <u>edited</u> data. Before attempting to make a correction, be sure you have selected the correct data version using the "Data Toggle" option. If you attempt to make a correction to any of the other data versions (reported, adjusted, weighted-adjusted), an error message will display: "You may not modify this field."

! You can correct the 'edited' version of the data provided:

1. You have the proper privileges to correct data (DATAPRIV = 'U' or 'P').
2. The data item is specified in the Item Data Dictionary as being a correctable field (CORFLG = 'U' or 'P').

3. The stat period is specified in the VSTATP file as being a correctable stat period.

An error message will display if you attempt to correct a field that is not correctable or if you do not have the proper privileges.

! If you make a correction to the edited data, values for the adjusted and weighted adjusted values will be blanked out. Adjusted and weighted values will only be updated if the adjust and/or weight programs are run.

! Click on the data field you want to correct to access the Single Item Update screen:

Figure 4.3.3a   Single Item Update

1. The current ID, item, and stat period are displayed. These fields are not correctable.

2. Key the new value for the item in the Value field and press <ENTER>.

3. The data flag window will display. Press <ENTER> to accept the default data flag of "A" ('analyst correction'), or select a different flag using the mouse.

4. You have the option of entering an imputation action flag (IMPACT). The imputation action flag controls whether an item value is to be imputed. Values include:

   blank   Follow imputation rules to determine whether to impute or not (default)
   Y   Impute, regardless of imputation rules
   N   Do NOT impute, regardless of imputation rules (even if failure)
   X   Follow rules to impute, but exclude from imputation base

   Note: You are not required to enter a value in the IMPACT field.

5. Press <ENTER> or click on the UPDATE button to apply the correction.

6. Press <CANCEL> to cancel the update. The item will revert to its original data value.

!   Any correction that you make is immediately applied to the database.

!   An audit trail will be created for all corrections applied to the database. The following fields
     will be included in the audit trail:

        SURVEY   Survey name
        STATP   Statistical period
        ID   Case ID
        ITEM   Item code/mnemonic
        OLDFLAG   Data flag before change
        NEWFLAG   Data flag after change
        OLDVAL   Value of item before change
        NEWVAL   Value of item after change
        USRNME   Name of user who made the change
        PRGNME   Name of program to update the value
        PRGDTM   Date/time the update took place

!   To access the Item Audit Trail:

     1. Click on "Item Data" from the GOTO pmenu.
     2. Click on "Audit Trail".
     3. Choose "Audit by ID" or "Audit by Date".

     NOTE: SEE CHAPTER 4.11 FOR MORE INFORMATION ON THE ITEM AUDIT TRAIL.

P-Menus

Historical Data Menu Screen:

P-Menu	Options	Function
HELP	Historical Data Screen Help (F1)	Display HELP information on using the Historical Data screen
	Function Keys	Display list of function keys and corresponding descriptions
	WhoamI (F7)	Display user default and systems information
EXIT	StEPS Main Menu (Home)	Return to StEPS Main Menu
	Exit (F3)	Exit to previous screen

Historical Data Table Screen:

P-Menu	Options	Function
UTILITIES	Next ID (F5)	Access next ID in selection set
	Previous ID (F4)	Access previous ID in selection set
	Next page (PgDwn)	Access next screen of data for ID
	Previous page (PgUp)	Access previous screen of data for ID
	Top	Access first observation in data table
	Bottom	Access last observation in data table
	Print	Print Historical Data table
GOTO	Control Data ➤ Control Information	Access Control Information screen for this ID
	Collection History	Access Collection History screen for this ID
	Status Changes	Access Status Changes screen for this ID
	Mail Group	Access Mail Group screen
	Audit Trail ➤ Control Audit by ID	Access Control Audit by ID screen for this ID
	Control Audit by Date	Access Control Audit by Date screen
	Item Data ➤ ID by Item	Access ID by Item screen for this ID
	ID by Item2	Access ID by Item2 screen for this ID
	ID Matrix	Access ID Matrix screen for this ID
	Item by ID	Access Item by ID screen (for selected item)
	Audit Trail ➤ Item Audit by ID	Access Item Audit by ID screen for this ID
	Item Audit by Date	Access Item Audit by Date screen
	Respondent Text	Access Respondent Text screen for this ID
	Notes	Access Notes screen for this ID
HELP	Historical Data Screen Help (F1)	Display HELP information on using the Historical Data screen
	Correcting Data	Display instructions for updating an item record
	Function Keys	Display list of function keys and corresponding descriptions
	WhoamI (F7)	Display user default and systems information

P-Menu	Options	Function
EXIT	StEPS Main Menu (Home) Exit (F3)	Return to StEPS Main Menu Exit to previous screen